

DFD QuoteHub



POLISHED, CUSTOMER-READY INSURANCE QUOTE PROPOSALS

Quote proposals are often the first thing your customers see – and first impressions matter.

DFD QuoteHub, a Sikich Digital Front Door solution, is a Salesforce-based quote proposal solution designed to help insurance teams generate professional, easy-to-read, customer-ready quote proposals quickly and consistently, without manual work or disconnected tools.

Built to work alongside any policy administration system, DFD QuoteHub gives insurers the flexibility to modernize their quoting experience while preserving their core technology investments.

Features

▪ **Professional quote proposals**

Create clear, branded, customer-friendly quote documents that reflect your organization's standards.

▪ **Salesforce-native experience**

Generate, manage, and collaborate on quote proposals directly within Salesforce.

▪ **System-agnostic design**

Works alongside existing policy administration systems without disruption.

▪ **Customizable proposal documents**

Tailor templates, branding, and language to fit your organization.

▪ **One-click PDF generation**

Instantly produce ready-to-share quote proposals.

▪ **Optional communication extensions**

Support email delivery and quote tracking as workflows evolve.

Benefits

▪ **Create a strong first impression**

Deliver polished, professional quote proposals that elevate the customer experience.

▪ **Save time**

Reduce manual effort and eliminate duplicate work.

▪ **Improve accuracy**

Minimize errors through a centralized, structured workflow.

▪ **Boost collaboration**

Enable sales, underwriting, and operations teams to work from a shared workspace.

▪ **Increase efficiency**

Accelerate quote turnaround without adding complexity.

A centralized quote proposal workspace

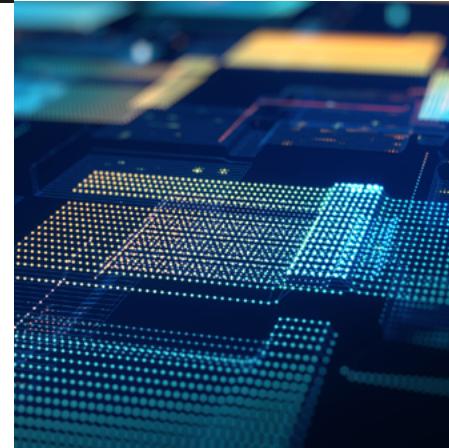
DFD QuoteHub brings together data, documents, and collaboration into one Salesforce-native quoting workspace. Instead of juggling multiple tools or manually assembling proposals, teams can generate and manage quote proposals within a single, intuitive workflow.

By separating the quote proposal experience from backend systems, DFD QuoteHub helps insurance organizations deliver consistent, modern customer interactions without forcing changes to core platforms.

Fast to deploy. Built to scale.

DFD QuoteHub is designed for rapid implementation. The solution supports customization and ongoing enhancements, allowing teams to adapt workflows, branding, and capabilities as business needs grow.

Backed by Sikich's insurance and Salesforce expertise, DFD QuoteHub evolves alongside your organization, supporting long-term modernization goals.



See DFD QuoteHub in action

Contact Sikich to schedule a demo and see how DFD QuoteHub can elevate your quote proposal experience.

For more information about our services, visit www.sikich.com.